

# **Business Process Improvement using ‘Data-Driven’ Workflow and Approval Routing**

# Agenda

## ➤ **What is 'Data-Driven' Workflow and Approval Routing Technology?**

### ➤ **Mr. Sean Brown, IT Manager**

- Sales Quotes
- Assembly Rework
- Journal Entries
- Month-end Closing



### ➤ **Technology 'Under the Hood'** (Mr. Frank Salesi, VP Solutions, ISS Group)

- Additional Technology Use Case Examples

### ➤ **The Future is Today!**

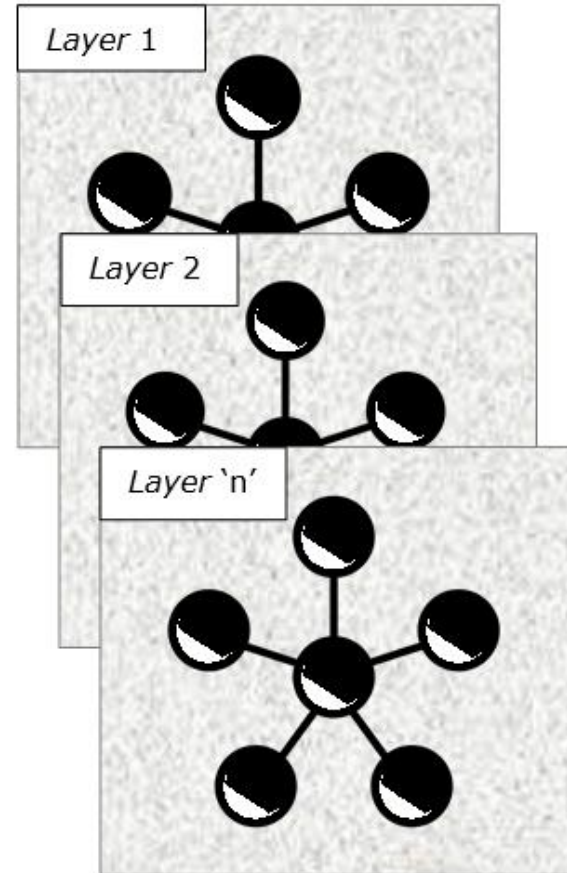
- JK Technosoft JV Partnership (Mr. Prabhu Jha, VP Strategic Accounts)

- **iApprove 2020™** Roadmap



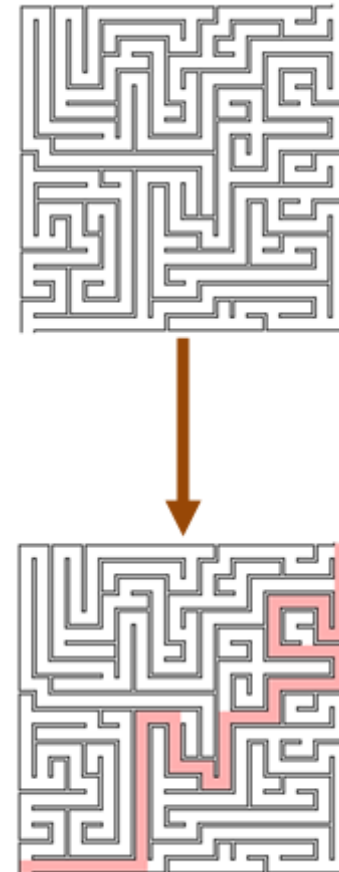
# What is 'Data-Driven' Workflow and Approval Routing Technology?

- A **layered** technological approach to creating and directing a hierarchical list of people and/or groups that are part of a particular Process.



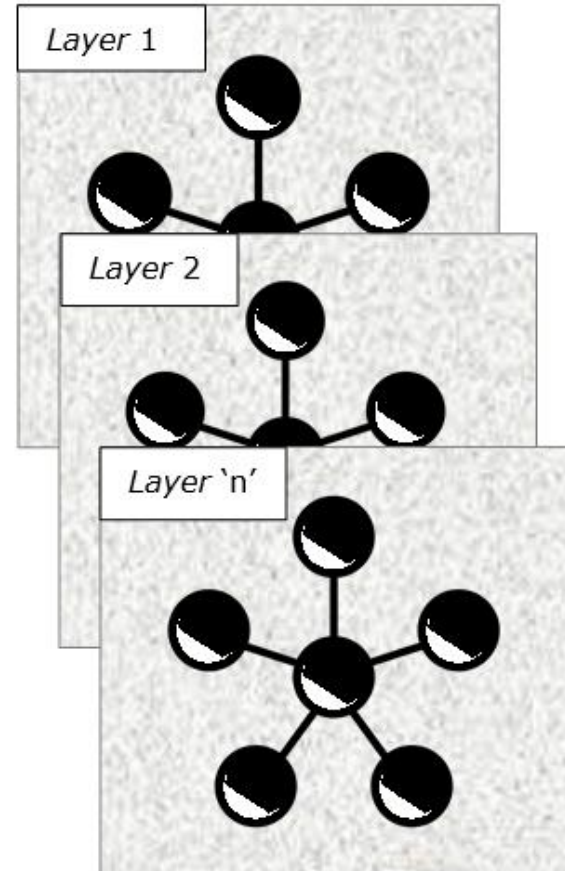
# Why 'Data-Driven' Workflow and Approval Routing Technology?

- To **satisfy** not only 'simple', but '**complex**' routing requirements **SIMPLY**.
- To **provide** the **flexibility** of creating a workflow and approval routing based on User Configurable Rules and any of the data associated with a Process.



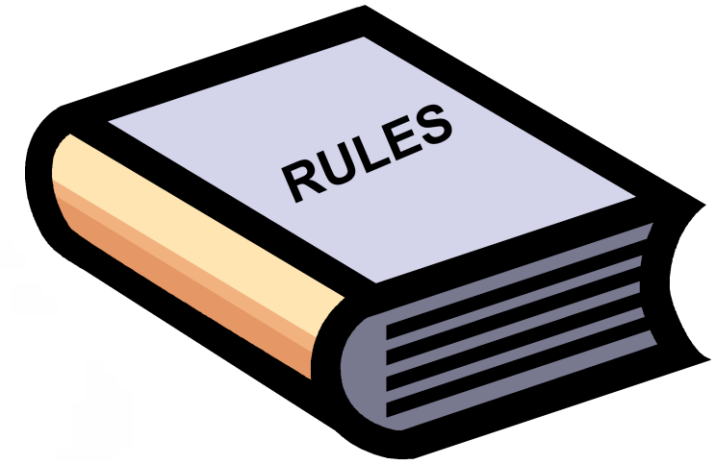
# What does each routing *Layer* contain?

- The **Layer #** (position in hierarchy)
- The **People/Groups** that will be added to the Process hierarchy
- The **Rules** (conditions) that are tested upon a Process Form being submitted for routing
- Workflow **Instructions**
- Other ...

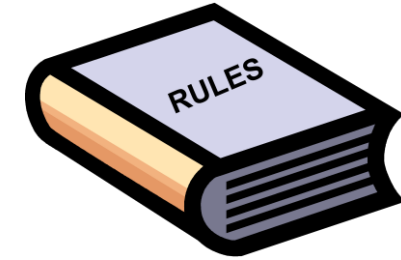


# What's a Rule?

- **Rules** are User defined **conditions**, *based on the data attributes associated with a Process*, that determine the list of people and/or groups required to participate in the Process.
- **Rules** can be based on any and all of the data attributes associated with a Process.



# Examples of Rules



## ➤ Example of a **simple** PO Requisition Rule

- *All PO Requisitions greater than **\$10,000\***, John (CEO) or Joe (CFO) needs to approve Requisition*

## ➤ Example of a more **complicated** PO Requisition Rule

*All 'Expense' **Type\*** PO Requisitions greater than **\$10,000\*** for the following **Cost Centers\*** (a,b,c,d) and for the Ohio or the Cleveland **Plant\*** being **Shipped\*** UPS or FedEx, OR the **Project Code\*** begins with an 'M', OR the **G/L Account Code\*** is  $\geq 8000$  and  $\leq 8999$ , OR **Supplier\*** is ISS Group, then Sam, Jane, John, and one member from the Accounting Group needs to approve Requisition*

\*Data Attribute

# Example of Actual Rule



AND +	OR +	AND +	<input type="checkbox"/>	Header.Reg Type	▼	Equals	▼	RM-METAL
		<input type="checkbox"/>	Header.GL Cost	▼	Greater Than or Equal To	▼	150000	
		<input type="checkbox"/>	Header.Buyer Engagement	▼	Not Equal To	▼	Contract	
		AND +	<input type="checkbox"/>	Header.Reg Type	▼	Can-Do	▼	!RM-METAL, RM*, !*
		<input type="checkbox"/>	Header.GL Cost	▼	Greater Than or Equal To	▼	150000	
		<input type="checkbox"/>	Header.Site	▼	Not Equal To	▼	320	
		AND +	<input type="checkbox"/>	Line.Approved By	▼	Is Blank	▼	
		<input type="checkbox"/>	Line.Sub Acct	▼	Can-Do	▼	250208, !*	
		<input type="checkbox"/>	Header.On Behalf of	▼	In List	▼	^SRCMGR, 200MGR, 250208M	
	<input type="checkbox"/>	Header.Userid	▼	Not In List	▼	^SRCDIR		





# Hierarchy based on results of Rules

Level	Approver	Approved By
Approval Attempt: 1 Submitted On 09/11/19 5:37:47 pm 		
50	 Vince (Director)	
100	 Demo Director (upto \$25K)	
100	 Brian Caulfield (Director - upto \$25K)	
175	 Vaseem Mahboob (CFO - upto \$300K)	
200	 John McDermott (President - upto \$1MM)	
600	Finance Group  Glenn Weinstein -   Scott Carpenter  Kelly Anderson	
900	 Tomoko Koyama (Buyer)	





# Mr. Sean Brown

## IT Manager

- Sales Quotes
- Assembly Rework
- Journal Entries
- Month-end Closing

# Use Case - Sales Quotes



**Customer** | Contacts | Custom | Other | Approval History

Cust Nbr:	<input type="text" value="01000000"/>	Contact Name:	<input type="text" value="Frank Salesi"/>	
Customer Name:	<input type="text" value="Colossal Conglomerates LTD1"/> *	Title:	<input type="text" value="Assistant"/>	
Address:	<input type="text" value="Suite 1000 Colossal Building"/>	Work Phone:	<input type="text" value="9738504428"/> *	
Address:	<input type="text" value="Colossal Industrial Park"/>	Mobile / Fax:	<input type="text" value="9738504428"/>	<input type="text" value="9738504428"/>
Address:	<input type="text" value="15000 Production Drive"/>	Email:	<input type="text" value="fsalesi@gmail.com"/> *	
City:	<input type="text" value="Evanston"/>	Site:	<input type="text" value="10000 - San Diego Main Plant"/> ▼ *	
State / Zip:	<input type="text" value="Illinois, USA"/> ▼	Currency:	<input type="text" value="United States Dollar"/> ▼ *	
	<input type="text" value="090876"/>	Credit Terms:	<input type="text" value="Net 30"/> ▼ *	
Country:	<input type="text" value="United States of America"/> ▼	Ship Via:	<input type="text" value="United Parcel Service"/> ▼	
Salesperson:	<input type="text" value="Willy Loman Incorporated"/> ▼ *	FOB Point:	<input type="text" value="Our Company"/> ▼	
Originator:	<input type="text" value="Frank Salesi"/> ▼ *			



# Sales Quotes Benefits



- ✓ Quote accuracy (Integration with QAD)
- ✓ Capturing Customer commitment (signature) in real-time
- ✓ Improved quote turnaround
- ✓ Improved pricing control
- ✓ Process standardization
- ✓ Global quote visibility





# Use Case - Journal Entries



**iApprove**

📄 Budget Request

☰ Journal Entries

← Back

## Journal Details

Jack Watson

[Click here for settings](#)



### Project Name

Reference Number  
**T287309089723**

Recurring  
✓ **Yes**

Control  
-

Currency  
**\$ Dollars**

Effective Date  
**06-09-2019**

Created on  
**06-09-2019**

Debit	Credit	GL Account	Sub Account	Entity	Description
\$ 76515.8	\$ 131923.3	-	Sub Account	Entity	Description
\$ 55408.05	\$ 7055195	-	Sub Account	Entity	Description
\$ 252553	\$ 1881948	-	Sub Account	Entity	Description

**iApprove™**

**iSS  
GROUP®**

# Use Case - Month-End Closing

## Closing Categories

- Pre-Close Activities
- Account Reconciliations (with Drill Downs)
- Journal Entries
- Quarterly and Semi Annual Activities
- Year End Activities
- Consolidation
- Financial Reviews
- Financial Reporting



# Technology 'Under the Hood'

**Mr. Frank Salesi**  
VP Solutions, ISS Group



# Use Case – Budget Request



Budget Request Budget Code: 123 User: Frank Salesi (Logoff) DEMO1 Theme: Cupertino

Budget Request Approval History

Status: NOT SUBMITTED Requestor: FRANK Entry Date: 2018-02-01 12:44 -05:00

Budget Code: 123 \* Project Mgr: Frank  
Short Name: 12321 \* Asst Mgrs:  
Site: \* Sponsor: 123123  
Amount: 123.00 \* Parent Budget Code:  
Use Unallocated Amount:

Save New Delete Copy Notes Audit Submit

### Budget Request Browse

<input type="checkbox"/>	Domain	Req Userid	Req Date	Req Status	Budget Code	Short Name	Site	Amount	Project Mgr	Asst Mgrs	Sponsor	Parent Budget Code	Use Unallocated
<input type="checkbox"/>	demo1	CARPENTS	2017-06-12 16:13:09	APPROVED	Essex3	test		20.00	Frank	tgoldstein, Frank,	tgoldstein		<input checked="" type="checkbox"/>
<input type="checkbox"/>	demo1	FRANK	2017-12-06 21:12:49	APPROVED	1129-299-10000	Daimler 60Ah - Tooling	10000	1,000,000.00					
<input type="checkbox"/>	demo1	FRANK	2017-12-06 21:28:36	APPROVED	1129-299-10000	Daimler 60Ah - Tooling	10000	1,000,000.00					



# Use Case – Check Voucher



Check Voucher Voucher No.: 9 User: Frank Salesi (Logoff) DEM01 Theme: Cupertino

Check Voucher Approval History

Status: APPROVED Requestor: GLENN Entry Date: 2018-02-12 11:31 -05:00

Voucher No.: 9

En favor de/For: \*

Propósito o Descripción  
Description of Payment: owe them money \*

Type/Tipo: \*

Division: 100 - Division 1 \*

Department: 100 - R & D \*

Account: \*

Sub Acct: 1001

Project: Project 3

Total: 1,000.00 \* USD \*

Save New Delete Copy Notes Audit

Check Voucher Browse

	Domain ↓	Req Userid ↓	Req Date ↓	Req Status ↓	En favor de/For	Dept	Div	Acct	Sub	Proj	Curr
<input type="checkbox"/>	demo1	CARPENTS	2018-01-29 17:30:52	NOT SUBMITTED		Dept 1	100				USD
<input type="checkbox"/>	demo1	CARPENTS	2018-01-29 17:31:04	NOT SUBMITTED							
<input type="checkbox"/>	demo1	FRANK	2018-01-29 22:40:14	APPROVED	MONSIVAIS BARRERA, JESUS (4)	100 - R & D	100 - Division 1	8002 - R & D	1001	Project 1	USD



# Use Case – Customer Credit Limit



Credit Increase Requisition

User: root (Logoff)

Theme: Cupertino

Account Data   Credit/Sales Data   Approval History

### Approval Information

Status: **APPROVED**   Requestor: **KSCHNIDT**   Entry Date: **05/10/19 18:19:27.883-04:00**

### Account Data

Division: **John Crane**

Name: **DOW AGROSCIENCES**

Terms: **NET 60 DAYS**

**Non Standard Terms have been selected**

Account: **23565**

Current Limit: **100,000.00**

Master Bill:

New Limit: **100,000.00**

Since Year: **2019**

Collector Code: **Sonya Lowe**

### Other

UCC Filed:

Type:

Save   New   Delete   Copy   Notes   Audit

### Credit Increase Requisition Browse

<input type="checkbox"/>	Status	Name	Account	New Limit	Current Limit	Terms	Originator	Req Date	Division
<input type="checkbox"/>	APPROVED	SUPERMETANOL C A V	75717	1.00	500,000.00	CIA	kschnidt	Fri May 10 2019 17:36:25 GMT-0400 (Eastern Daylight Time)	John Crane
<input type="checkbox"/>	APPROVED	DOW AGROSCIENCES	23565	100,000.00	100,000.00	N60	kschnidt	Fri May 10 2019 18:19:27 GMT-0400 (Eastern Daylight Time)	John Crane
<input type="checkbox"/>	APPROVED	AAA PUMP SERVICE INC	U0780	5,000.00	0.00	N30	kschnidt	Thu May 16 2019 12:43:43 GMT-0400 (Eastern Daylight Time)	USS SEAL MFG



# Use Case - Employment Requisition



Employment Requisition      Req Number: 0      User: Frank Salesi (Logout)      DEMO1      Theme: Cupertino

- Job Info**
- Duties
- Justification
- Finance
- Approval History

Status: **APPROVED**    Requestor: **FRANK**    Entry Date: **2018-01-24 22:51 -05:00**

Req Number:

Job Title:  \*

Division:  \*

Relocation:

Department:  \*

Reports To:

Type:  \*

Start Date:

Temporary:

Temp From/To:    

Employee Being Replaced:

Reason Employee Leaving:

Employee Leaving Date:

Status:  \*

Special Training/Medical Testing Required:

Comments:

Special Comments:

- Save
- New
- Delete
- Copy
- Notes
- Audit

## Employment Requisition Browse

<input type="checkbox"/>	Req Date ↓	Req Userid ↓	Req Status ↓	Div	Job Title	Replaced	Reports To	Req Type	Salary	Req Nbr
<input type="checkbox"/>	2018-01-24 22:51:33	FRANK	APPROVED	Division 1	21321		Andrew	Addition	12.00	0
<input type="checkbox"/>	2018-01-25 13:25:53	FRANK	APPROVED	Division 1	21321	123	Andrew	Replacement	12.00	0
<input type="checkbox"/>	2018-01-25 19:07:14	FRANK	PENDING	Division 1	21321	123	Andrew	Replacement	12.00	1
<input type="checkbox"/>	2018-01-25 19:07:38	FRANK	NOT SUBMITTED	Division 1	21321	123	Andrew	Replacement	12.00	2



# Use Case – QAD New Item Add



new Item    Item Nbr: XX99    User: Frank Salesi (Logoff)    DEM01    Theme: Cupertino

**Base Item Data**    New Components    Item/Site Planning    Item/Site Inventory    Product Structure    Item Cost    Customer XREF    Supplier XREF    Routing    Inv Trans

Approval History

Status: **NOT SUBMITTED**    Requestor: **CARTERB**    Entry Date: **2015-04-03 19:20 -04:00**

Item Nbr:  \*    Prod Line:

UOM:  \*    Type:

Description 1:  \*    Group:

Description 2:  \*    Site:

**There are 2 New Components defined for item XX99**

Save    New    Delete    Copy    Notes    Audit

**New Item Requests**

<input type="checkbox"/>	Req Userid	Req Date	Req Status	Item Nbr	UOM	Description 1	Prod Line	Type	Group	Site	P	M
<input type="checkbox"/>	FRANK	2015-04-03 11:57:03	APPROVED	22-100	EA	Description Line 1	1500			10000		
<input type="checkbox"/>	FRANK	2015-04-03 15:51:25	APPROVED	311231	DR	你好我的名字是坦	W-10			10000		
<input type="checkbox"/>	GLENN	2015-04-03 16:46:55	NOT SUBMITTED	ABC1	EA	This is for Peter				10000		



# Use Case – PO Requisitions → PO's

Req#: T0405004    Entry Date: 08/15/2019    Need Date: 08/22/2019    Perf Date: 08/22/2019    Type: Capex

Header Information    Header Notes/Attachments    Master Comments    Approval History    Blanket Information    **Not Yet Submitted**

PO Number:    Ship To: Textbook Dollars    Buyer: Tomoko Koyama (Buyer)    Customer:   

Supplier: CDW    Bill To: Textbook Dollars    Originator: Frank    PEA:   

Supplier Nbr: 5004000    Site: Textbook Dollars    On Behalf Of: Frank    Capital Equipment:   

Supplier Address: A Division of Hughes Intl.  
Oxnard, CA 90293  
Terms - 2/10-30    Currency: United States Dollar    Deliver To: Frank    CAL List:   

Supplier Phone: 805-923-1254    Who Pays Freight:    Copied From:    Chemical:   

Supplier Fax:    Ship Via: United Parcel Service   

Supplier Contact: Ms. Danielle Gregory    Project:   

Supplier Email: fsalesi@gmail.com    Taxable:   

Is a PO Required?:     Allow PO Consolidation?:

Are all Items Req'd?:     High Priority?:

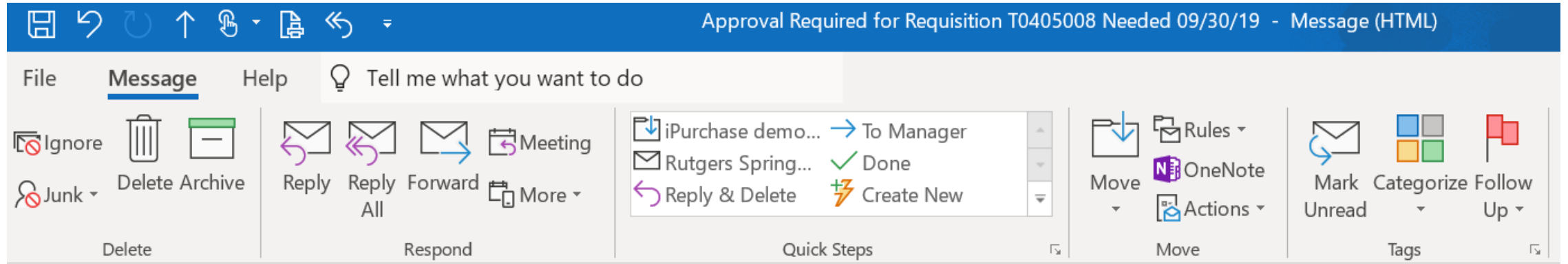
PO Blanket?:     Need a Quote?:

New Item    Add from Catalog    Add from Punchout    View Deleted Items    Batch Edit Items


Line	LT	Item	Due	Acct-Sub-Dept	Project	Budget Code	Qty	Cost	Ext Cost
001	P	3679037 - Apple USB C Digital AV Multiport Adapter 43201401 - Graphics or video accelerator cards	08/22/19	8200-1000-0900			1.00	67.62	\$ 67.62
<b>Total \$ 67.62</b>									




# Demo PO Requisition Approval via eMail



Approval Required for Requisition T0405008 Needed 09/30/19

 Frank Salesi  
To Andrew Weinstein

 If there are problems with how this message is displayed, click here to view it in a web browser.

Frank has submitted a Requisition that requires your approval.

Actions: [View](#) [Approve](#) [Reject](#)

If questions, please contact [helpdesk@issgroup.net](mailto:helpdesk@issgroup.net)

**Approve/Reject directly from email**

# Technology 'Inside'

**iApprove™** - 'Misc.' Workflows & Approvals\*

**iPurchase™** - PO Requisitions -> PO's\*

**iQuote™** - Sales Quotes -> Sales Orders\*

\* *Real-time integrated with QAD*



# The Future is Today!



## Mr. Prabhu Jha

### VP Strategic Accounts, JK Technosoft

- Joint Venture with ISS Group
  - *Enhance ISS Group Solutions Functionality*
  - *Bring Next-Gen Technology offerings to the QAD Community*



# Digital @ JKT



## Analytics

BI, Advanced Analytics, Self Service BI, Data Value chain

## Artificial intelligence

Machine Learning, Deep Learning, NLP, Recommendation, Predictions

## Internet of Things

IoT Platforms (KAA), Android Things, Microcontrollers, Sensors

## Blockchain

Ethereum, Hyperledger, Multichain, Custom

## AI Chatbots

Customer Services, Sales, Support

## RPA

AA, Kryon, UiPath (Enterprise RPA platform and IQ Bots)

## UX

User Experience, User Interface, Engagement, Collaboration

## DevOps

CI/CD, Environments, Cloud, Source Control Strategies, Monitoring, KTLO

## Digital Lab

Co-creation, Thought Leadership, R&D, POC

# iApprove 2020™ Roadmap



- **Mobile Functionality**
- **New Responsive Design for improved UX**
- **Pre-built Process Forms Libraries**
  - Finance (Budgets, Journal Entries, Closing Activities, ...)
  - Material Management (Purchasing, Scrap, Unplanned Issues, ...)
  - Sales (Quotes, Expense Requests, ...)
  - HR (Employment Requisition, Vacation Requests, ...)
- **???** (*Send us your suggestions and if any of your suggestions are put into the product we'll send you a \$50 Visa Gift card!*)

**Send suggestions to [fsalesi@issgroup.net](mailto:fsalesi@issgroup.net)**

# Copy of Presentation

A download of this presentation is available on the ISS Group Blog page at:

[www.ISSGroup.com/news](http://www.ISSGroup.com/news)

# Questions?

Contact Andy Weinstein at:

[aweinstein@issgroup.net](mailto:aweinstein@issgroup.net)

**Thank You!**